An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Irish Communications Market

Summary: Quarterly Key Data Report

Data as of Q4 2024

Information Notice

Reference:	ComReg 25/13
Version:	Final
Date:	13/03/2025

An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation
1 Lárcheantar na nDugaí, Sráid na nGildeanna, BÁC 1, Éire, D01 E4X0.
One Dockland Central, Guild Street, Dublin 1, Ireland, D01 E4X0.
Teil | Tel +353 1 804 9600 Suíomh | Web www.comreg.ie

Contents

1. Background

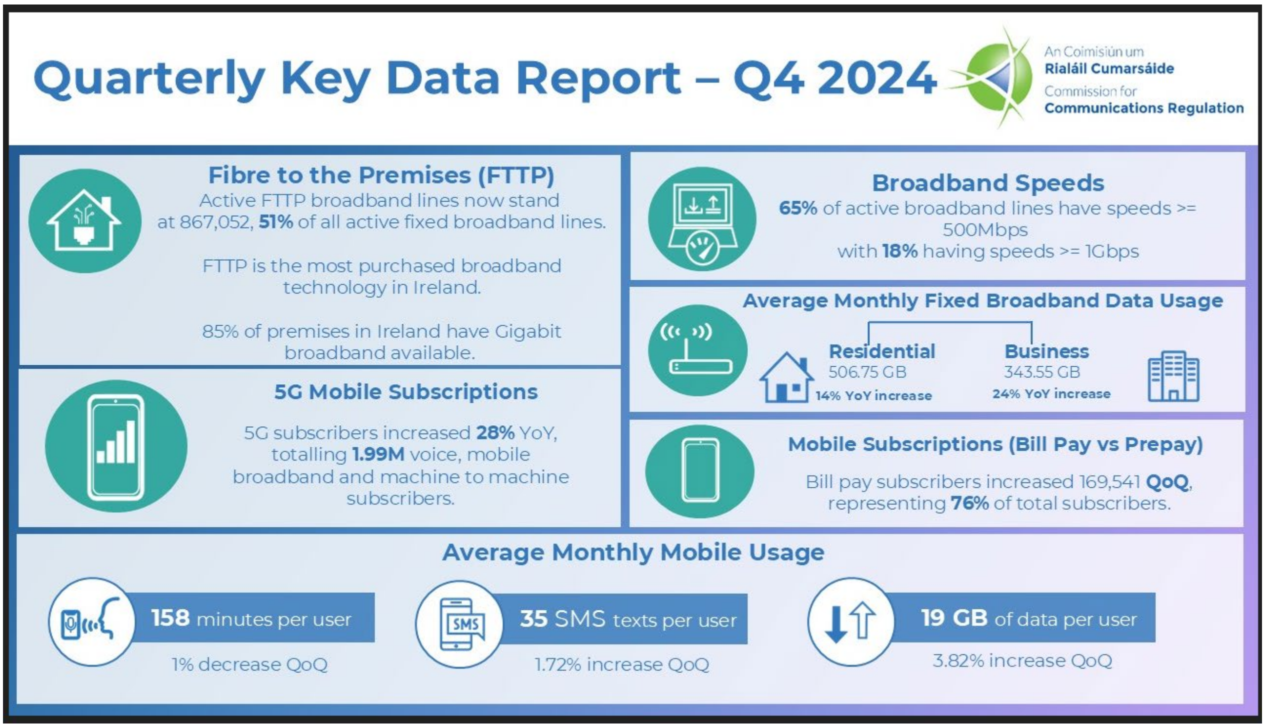
ComReg collects statistical data from authorised operators on a quarterly basis. Not all such operators are included in this data collection (based on minimum revenue levels), but ComReg aims to represent 95% of the total markets. This data includes information on subscriptions, lines, revenues, broadband speeds, minutes and data usage for both fixed and mobile voice and broadband. The data and charts included below are a subset of the information collected. The detailed presentations of data are available on the ComReg data portal www.comreg.ie/industry/electronic-communications/data-portal .

Data presented in this Summary of the Quarterly Key Data is based on questionnaires completed by certain authorised operators for the period from 1st October 2024 to 31st December 2024. The report is based on submissions from 52 active operators.

The report contains the following key charts/data:

- Overview of Markets
  - Table 1 – Communications Summary
- Fixed Markets
  - Figure 1 – Fixed Line Market Shares based on Wholesale and Retail Revenue
- Fixed Voice
  - Figure 2 – Retail Fixed Voice Subscriber lines
- Retail Broadband Market
  - Table 2 – Total Number of Active Subscriber Broadband Lines
  - Figure 3 – Retail Fixed Broadband Market Shares based on Subscriber Lines
  - Table 3 – Retail Fixed Broadband Subscriber Lines by Sold Download Speed
  - Figure 4 – Retail FTTP Subscriber Lines Market Shares
- Broadband Market - Networks
  - Figure 5 – Network FTTP Active Subscriber Lines by Quarter
  - Figure 6 - Network FTTP Lines Broadband Rollout (No of Lines)
- Mobile Market
  - Figure 8 – Retail Market Shares by Subscription including Mobile Broadband (MBB) and Machine to Machine (M2M)
  - Figure 9 – Retail Market Shares by Subscription excluding Mobile Broadband (MBB) and Machine to Machine (M2M)
- Corrigendum
- Appendix

1 Q4 2024 Infographic



2. Overview of Irish Communications Market Q4 2024

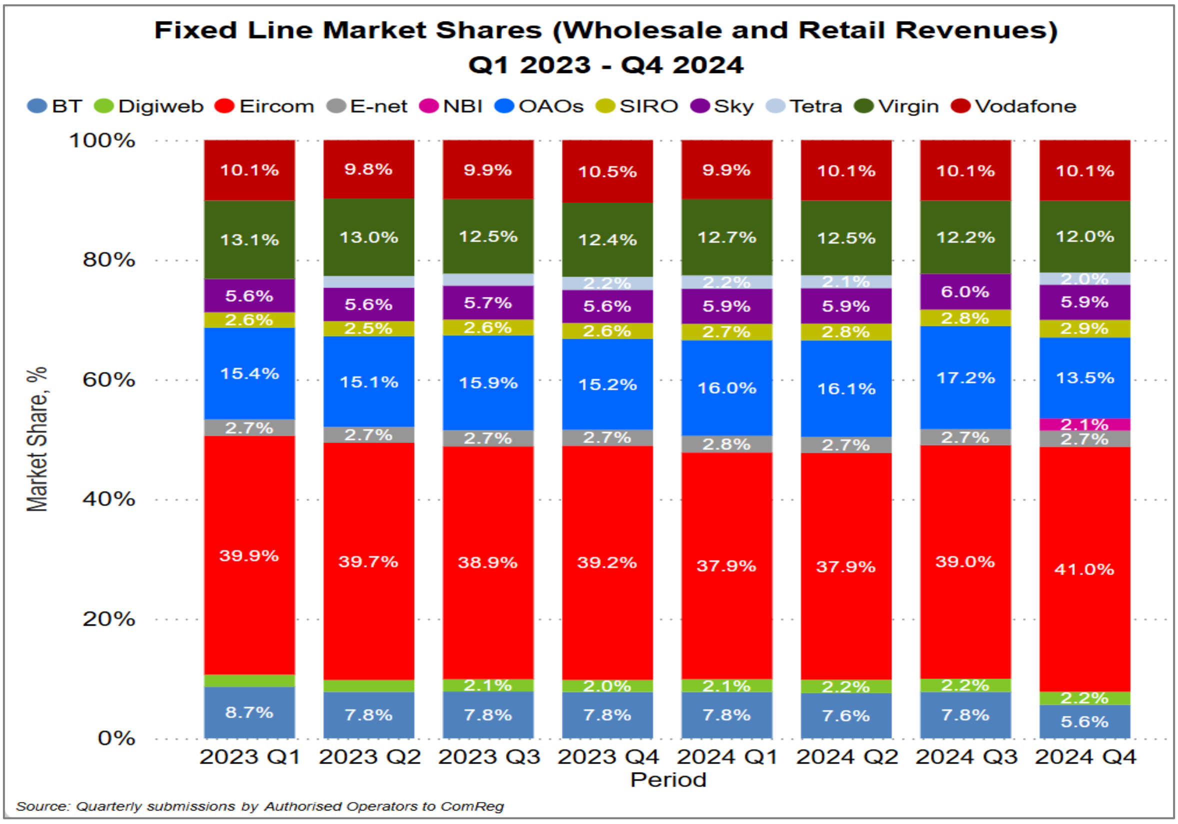
Table 1 - Communications Summary

Revenues	2024 Q3	2024 Q4	QoQ	YoY
Total Retail Market Revenues (000s)	€ 928,068	€ 926,900	-0.1%	-2.7%
Total Fixed Line Wholesale Revenues (000's)	€ 158,251	€ 165,591	4.6%	-1.6%
Total Mobile Wholesale revenues (000's)	€ 30,629	€ 30,654	0.1%	-12.9%
Total Gigabit (FTTP and Cable) Coverage	**2024 Q3**	**2024 Q4**	**QoQ**	**YoY**
Percentage Premises with FTTP Broadband Available	71%	74%	2.6%	10.6%
Percentage Premises with Gigabit Infrastructure (FTTP or Cable) Broadband Available	83%	85%	1.6%	7.6%
Gigabit (FTTP and Cable) Take Up Rate	**2024 Q3**	**2024 Q4**	**QoQ**	**YoY**
FTTP Take Up Rate (Measured by Unique Eircodes)	48%	49%	1.0%	4.4%
FTTP & Cable Take Up Rate (Measured by Unique Eircodes)	57%	57%	0.8%	2.7%
Subscriber Lines	**2024 Q3**	**2024 Q4**	**QoQ**	**YoY**
Total Fixed Broadband Subscriber Lines	1,683,200	1,697,495	0.8%	2.4%
Total Fixed Voice (PSTN, ISDN and VOIP) Subscriber lines	1,105,730	1,078,038	-2.5%	-8.4%
Mobile Subscriptions inc. MBB and M2M - Total	10,145,572	10,295,164	1.5%	5.8%
Machine to Machine (M2M) Subscriptions	3,871,056	3,984,713	2.9%	10.9%
Mobile Broadband Subscriptions	394,408	391,262	-0.8%	2.3%
Mobile Subscriptions exc. MBB and M2M - Total	5,880,108	5,919,189	0.7%	2.8%
Voice Traffic	**2024 Q3**	**2024 Q4**	**QoQ**	**YoY**
Total Voice Traffic Minutes (000s)	3,062,834	3,031,624	-1.0%	-3.9%
Total Fixed Voice Minutes (000's)	246,490	225,197	-8.6%	-20.6%
Total Mobile Voice Minutes (000's)	2,816,344	2,806,428	-0.4%	-2.3%

Fixed Market

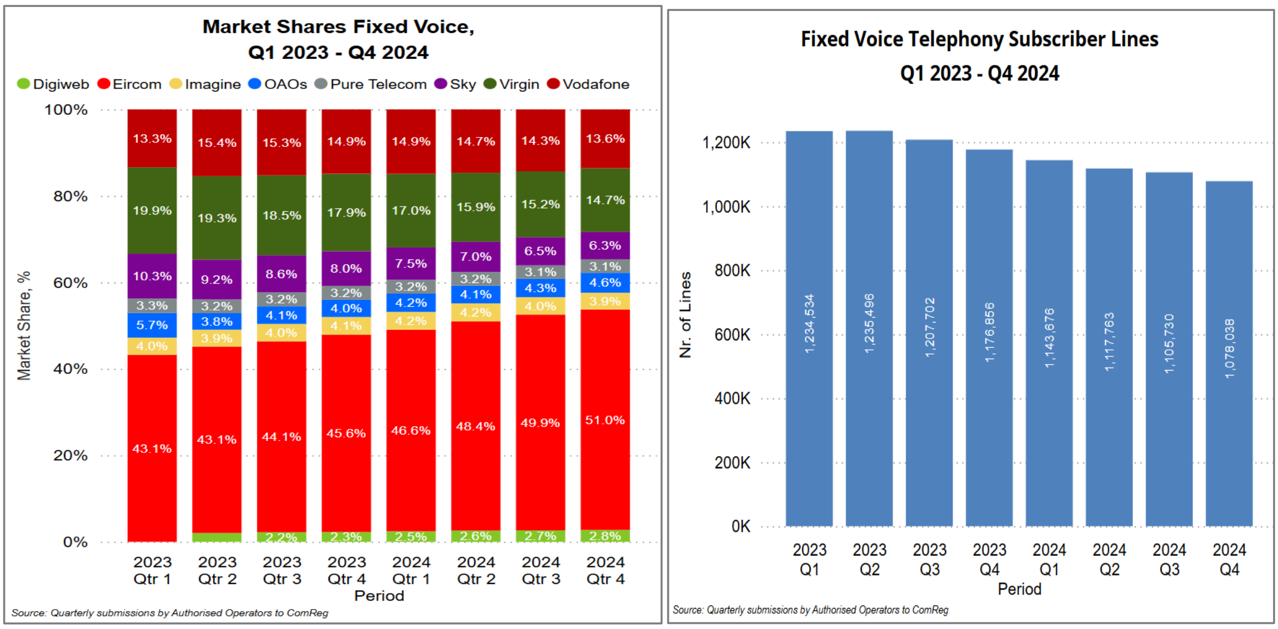
- In Q4 2024, Eir had the highest revenue share (retail and wholesale) in the fixed market at 41%.
- ComReg estimates that the next nine largest operators (Virgin Media Ireland, Vodafone (fixed only), Sky Ireland, BT Ireland, SIRO, E-Net, Digiweb, National Broadband Ireland and Tetra) contribute a further 45.5% share of total industry revenue.
- Remaining operators (OAOs) account for the residual 13.5% share.

Figure 1 - Fixed Line Market Shares based on Wholesale and Retail Revenue



Retail Fixed Voice Market

Figure 2 – Retail Fixed Voice Subscriber Lines



- Fixed voice traffic in Q4 2024 was around 225 million minutes, which was a 9% decrease on Q3 2024 and a decrease of 21% since Q4 2023.

- At the end of Q4 2024, there were 1,078,038 fixed voice subscriber lines (a decrease of 3% since Q3 2024 and a decrease of 8% on Q4 2023).

- As of Q4 2024, Eir had 51% of all fixed voice subscriber lines followed by Virgin Media (14.7%), Vodafone (13.6%), Sky (6.3%), Imagine Telecommunications Limited (3.9%), Pure Telecom (3.1%) and Digiweb (2.8%). Other operators accounted for the remaining 4.6% of fixed voice subscriber lines.

3. Retail Broadband Market

At the end of December 2024, there were over 2 million active total Broadband subscriber lines in Ireland. This is a 0.5% increase from the previous quarter and a 2.4% increase on Q4 2023. Looking at total Fixed Broadband lines only, these increased by 0.85% since Q3 2024, with a 2.4% annual increase on Q4 2023.

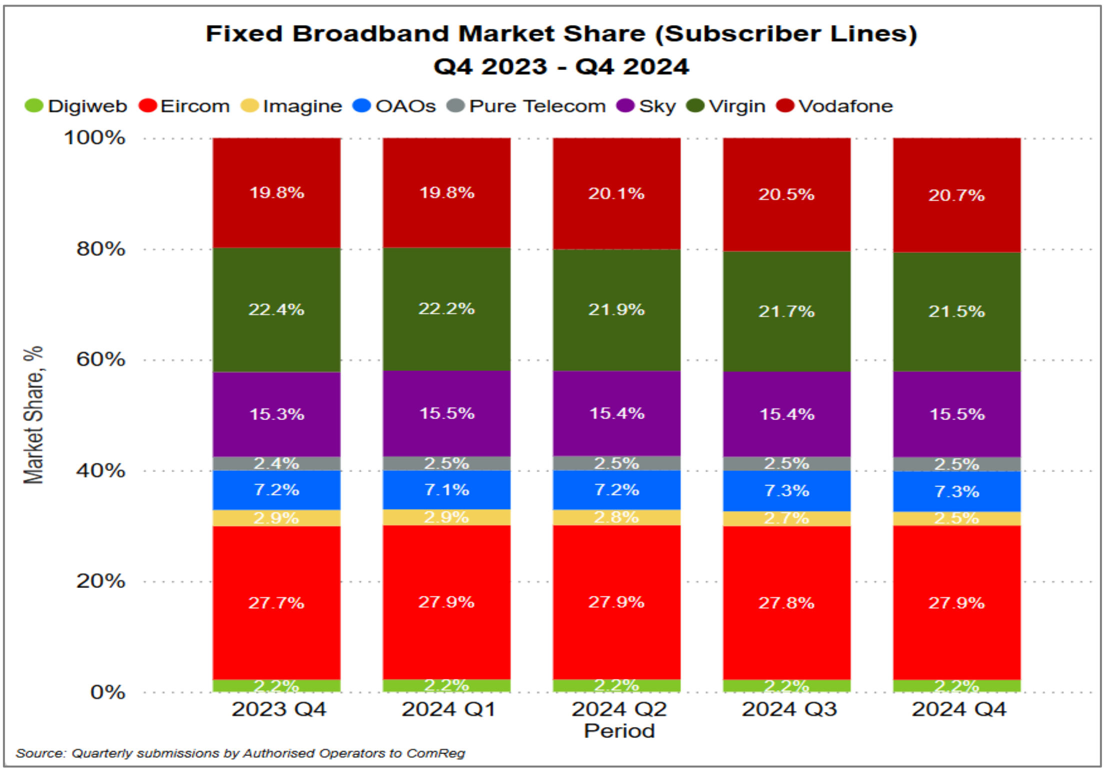
Table 2 - Total Number of Active Broadband Subscriber Lines

Line Type	Q4 2024	Quarterly Change Q3'24 – Q4'24	Annual Change Q4'23 – Q4'24
Cable Broadband	318,464	-2.27%	-8.55%
DSL Broadband	62,398	-7.18%	-28.06%
VDSL Broadband	355,009	-5.31%	-21.36%
FTTP Broadband	867,052	6.12%	29.34%
Satellite Broadband	14,307	7.79%	85.11%
FWA Broadband	80,265	-5.46%	-13.44%
Total Fixed Broadband	**1,697,495**	0.85%	2.43%
Mobile Broadband	391,262	-0.80%	2.29%
Total Broadband	**2,088,757**	**0.54%**	**2.4%**

- FTTP[1] (+6%) and Satellite (+7.8%) broadband subscriber lines showed positive growth this quarter. VDSL (-5%), DSL (-7%), FWA[2] (-5.5%), Cable (-2.3%) and mobile broadband (-0.8%) subscriber lines fell this quarter.

[1] Fibre to the Premises.
[2] Fixed Wireless Access.

Figure 3 – Retail Fixed Broadband Market Shares based on Subscriber Lines



- In Q4 2024, Eir had 27.9% of total retail fixed broadband subscriber lines, followed by Virgin Media at 21.5%, Vodafone had 20.7%, Sky Ireland 15.5%, Imagine 2.5%, Pure Telecom 2.5% and Digiweb 2.2%.

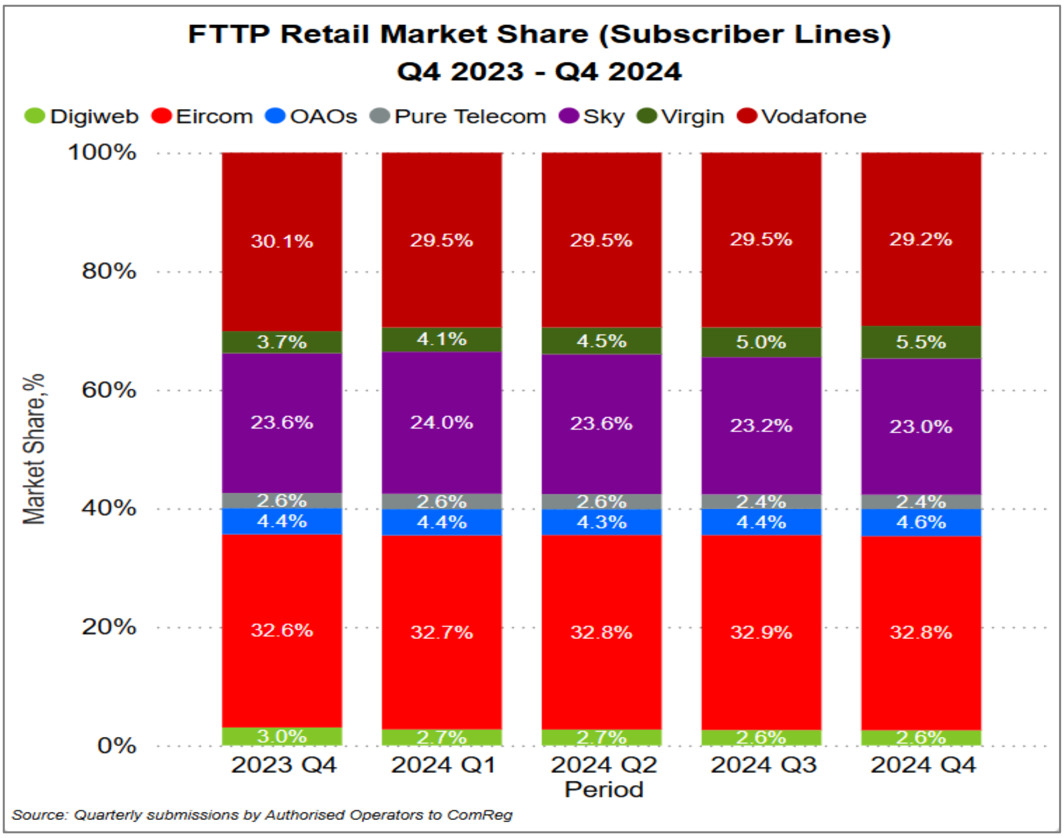
- All other operators (OAO's) combined accounted for the remaining 7.3% share of retail fixed broadband subscriber lines.

Table 3 - Retail Fixed Broadband Subscriber Lines by Sold Download Speed

Fixed Broadband Subscriber Lines by Sold Speed	Q3 2024	Q4 2024	Quarterly Change
<2Mbps - 9.99Mbps	2.51%	2.32%	-0.19%
=10Mbps - 29.99Mbps	3.82%	3.52%	-0.29%
=30Mbps - 99.99Mbps	22.13%	20.85%	-1.28%
=100Mbps - 499.99Mbps	12.17%	7.81%	-4.36%
=500Mbps - 999.99Mbps	44.88%	47.37%	2.49%
>=1GB	14.49%	18.14%	3.65%

- In Q4 2024, 73.3% of all fixed broadband subscriber lines had sold download speeds which were equal to or greater than 100Mbps, with 65.5% having sold download speeds equal to or greater than 500Mbps, a 6.1% quarter on quarter increase. Those having sold download speeds equal to or greater than 1GB increased by 3.7% quarter on quarter and stood at 18.14%.

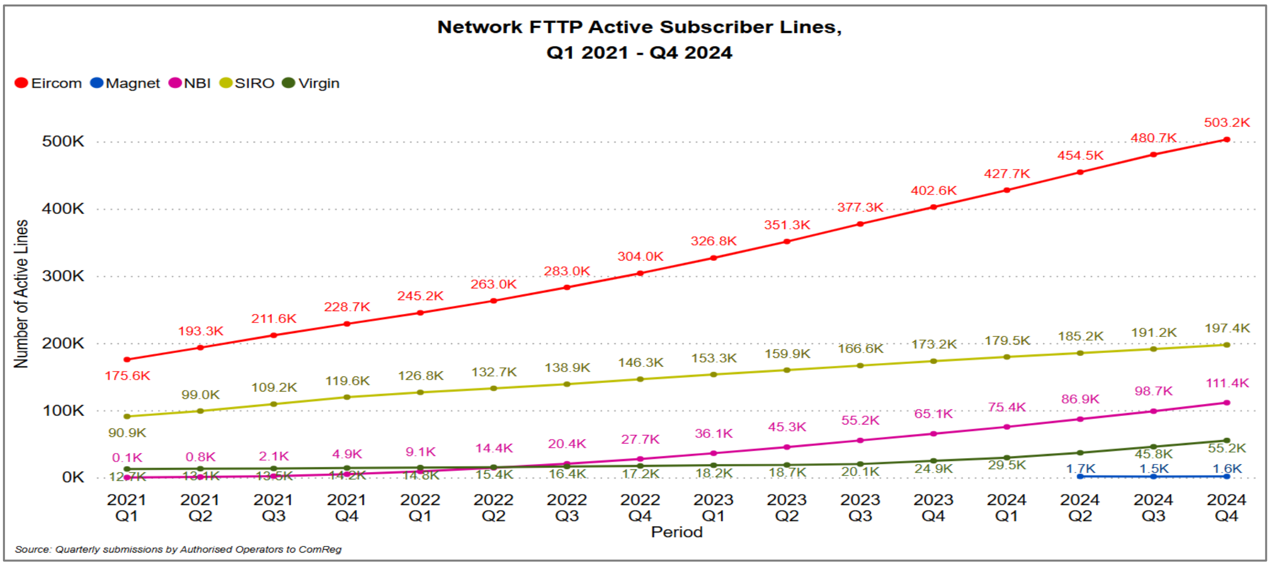
Figure 4 - FTTP Subscriber Line Market Share



- In Q4 2024, Eircom had 32.8% of retail Fibre to the Premises (FTTP) subscriber lines, followed by Vodafone with 29.2%, Sky Ireland at 23.0%, Virgin Media at 5.5%, Digiweb at 2.6% and Pure Telecom at 2.4%. Other operators accounted for the remaining 4.6%.

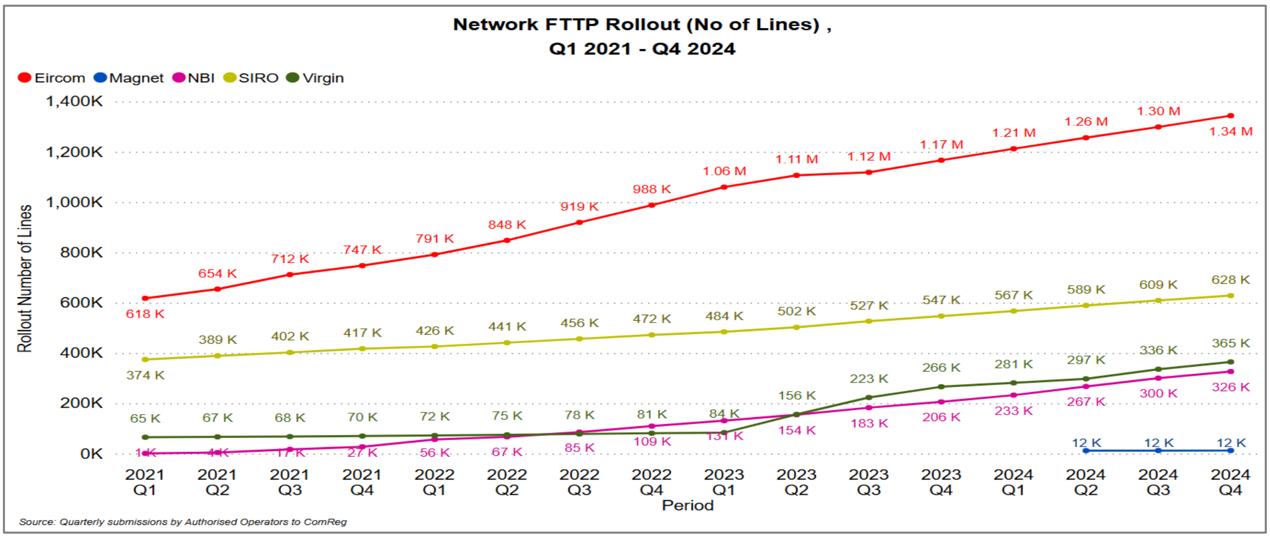
4. Broadband Market - Networks

Figure 5 – Network FTTP Active Subscriber Lines by Quarter



- In Q4 2024, based on the underlying network, 503k (up 5% QoQ) of the active FTTP subscriber lines were sold on the Eircom network, 197k (up 3% QoQ) were on the Siro network, 111k (up 13% QoQ) were on the NBI network, 55k (up 20% QoQ) were on the Virgin Media network and 1.5k were on the Magnet Network[3].

Figure 6 – Network FTTP Broadband Rollout (No. of Lines) by Quarter



[3] Magnet began reporting Network FTTP lines in Q2 2024, the number of lines at the end of Q2 would be broadly similar to the lines present in the previous years.

- In Q4 2024, Eircom reported having 1.34m (up 3% QoQ) FTTP broadband lines[4], followed by Siro with 628k (up 3% QoQ), Virgin Media Ireland with 365k (up 9% QoQ), NBI with 326k (up 9% QoQ), Magnet with 12k[5] and Crossan with 63 lines.

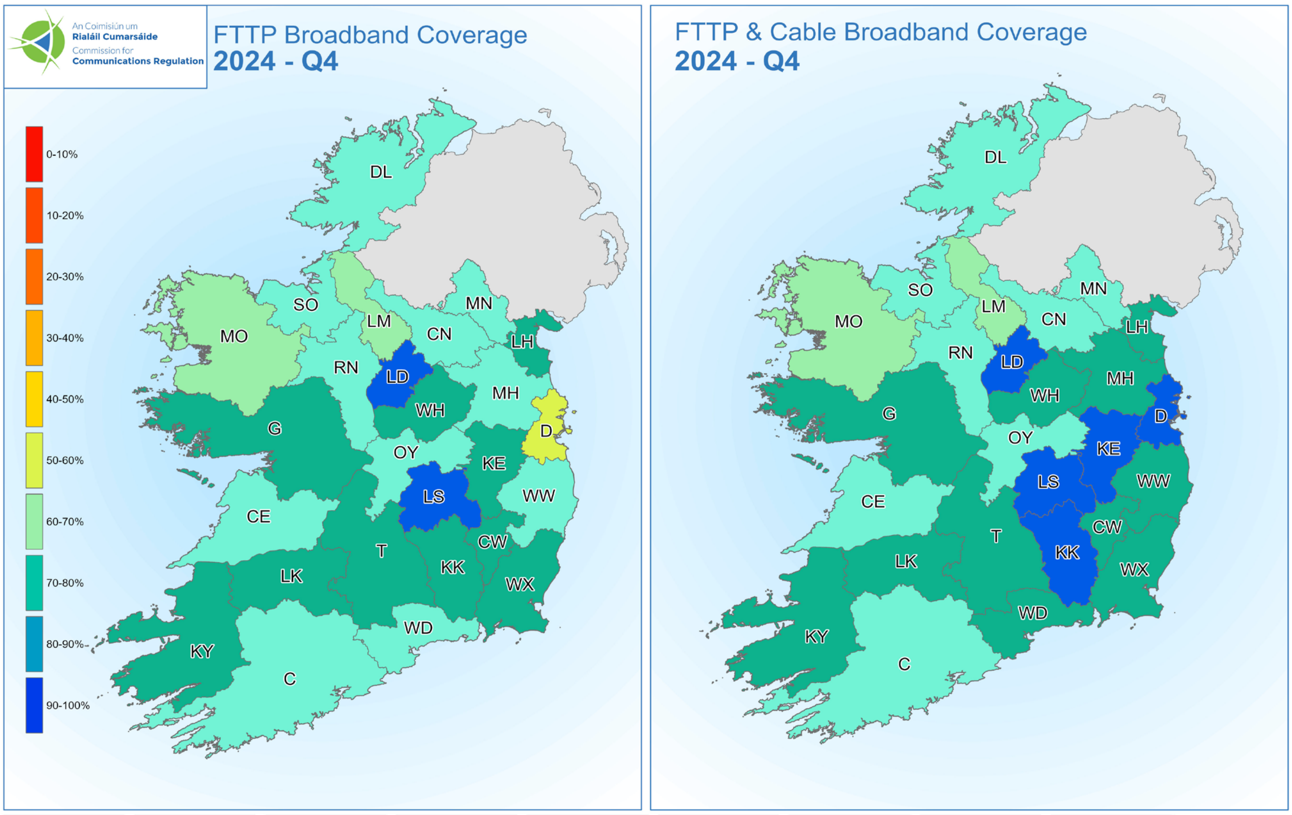
Total Gigabit (FTTP and Cable) Coverage

- 74% (up 3 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland[6] had FTTP broadband available at the end of Q4 2024.
- 85% (up 2 percentage points QoQ) of all premises (as measured by Eircodes) in Ireland had Gigabit broadband available at the end of Q4 2024.
- The maps set out below show County level 'FTTP' and 'Gigabit' Coverage for Q4 2024.
- The County with the highest level of FTTP coverage is Laois at 92%, Longford has the highest level of Gigabit coverage at 93%.
- Leitrim has the fastest growing FTTP coverage within the last year, with a 35-percentage point increase in FTTP coverage compared to Q4 2023.
- Offaly has the fastest growing FTTP coverage since last quarter with an 8-percentage point increase in FTTP coverage compared to Q3 2024.

[4] The Network Operators Eircom, NBI, SIRO, Virgin Media, Magnet and Crossan each provide information on total FTTP broadband lines rolled out. This metric is based on the total number of FTTP lines, with a premises potentially having more than one FTTP broadband line. For example, a business premises may have multiple FTTP broadband lines. Individual Network Operators may also have FTTP broadband lines at the same premises. Therefore, adding the operators figures together does not indicate unique premises coverage. This coverage is captured as part of the Total FTTP and Cable Coverage.

[5] Magnet began reporting Network FTTP lines in Q2 2024, the number of lines at the end of Q2 would be broadly similar to the lines present in previous years.

[6] Each Network Operator provides a list of Eircodes associated with each broadband line. ComReg combines all Eircodes and derives a unique coverage figure for each premises by removing instances where Eircodes are passed by more than one network. Each premises (Eircode) which has FTTP and/or Cable is only counted once regardless of how many lines are present at the premises (Eircode). This total premises (Eircodes) passed figure is then divided by the total Eircodes for Ireland, which is taken from the 'Postal Address' field of the Eircode database.

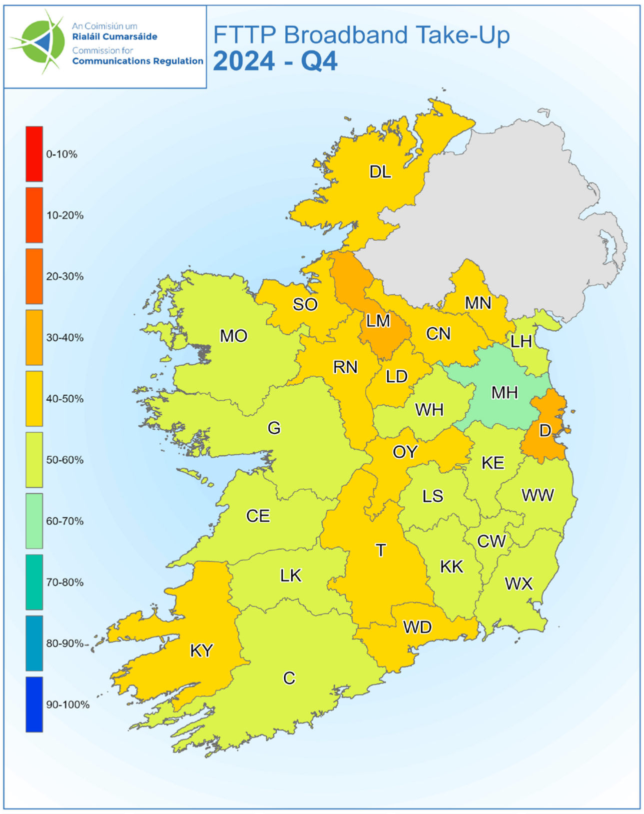


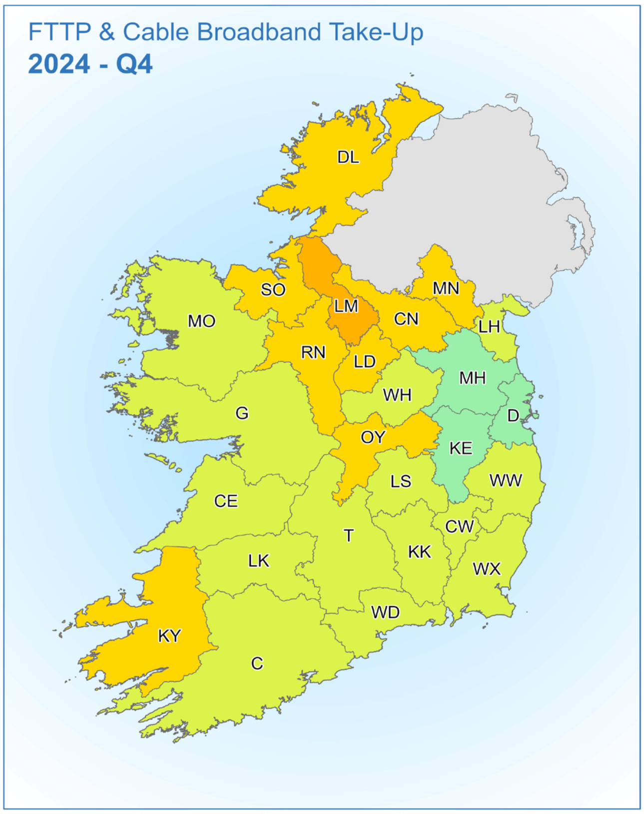
Code	County
C	Cork
CE	Clare
CN	Cavan
CW	Carlow
D	Dublin
DL	Donegal
G	Galway
KE	Kildare
KK	Kilkenny
KY	Kerry
LD	Longford
LH	Louth
LK	Limerick
LM	Leitrim
LS	Laois
MH	Meath
MN	Monaghan
MO	Mayo
OY	Offaly
RN	Roscommon
SO	Sligo
T	Tipperary
WD	Waterford
WH	Westmeath
WW	Wicklow
WX	Wexford

Total Gigabit (FTTP and Cable) Take-Up[7]

- In terms of FTTP take-up (active premises divided by premises where FTTP is available), 49% (up by 1 percentage point QoQ) of all premises with FTTP broadband available had an active FTTP service at the end of Q4 2024.
- 57% (unchanged QoQ) of premises with FTTP or Cable available had an active FTTP or Cable service at the end of Q4 2024.
- The maps set out below show County level 'FTTP' and 'Gigabit' take-up rate by County for Q4 2024.
- The County with the highest level of FTTP take-up is Meath at 62%. Laois has the fastest growing FTTP take-up rate within the last year, with an 8-percentage point increase in take-up compared to Q4 2023.
- Full tabular data and map visualisations for 'FTTP' and 'Gigabit' Coverage and Take-Up statistics by County by Quarter can be found at ComReg's [Open Data Map Hub](#).

[7] This metric is based on the total number of active FTTP premises where a unique active figure is derived for each premises (as measured by Eircodes). This removes instances where a single premises (e.g. a business) has multiple lines at the premises. This active FTTP premises figure is then divided by the total unique premises passed figure as calculated under 'Total FTTP and Cable Coverage'.





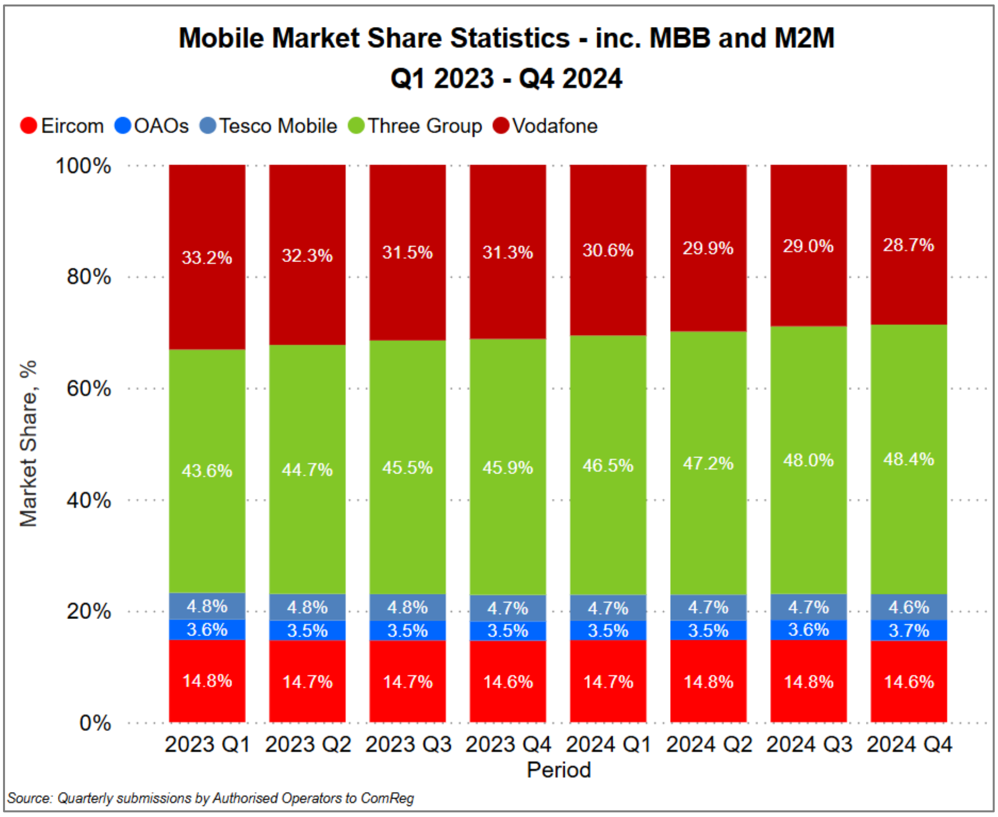
Code	County
C	Cork
CE	Clare
CN	Cavan
CW	Carlow
D	Dublin
DL	Donegal
G	Galway
KE	Kildare
KK	Kilkenny
KY	Kerry
LD	Longford
LH	Louth
LK	Limerick
LM	Leitrim
LS	Laois
MH	Meath
MN	Monaghan
MO	Mayo
OY	Offaly
RN	Roscommon
SO	Sligo
T	Tipperary
WD	Waterford
WH	Westmeath
WW	Wicklow
WX	Wexford

Created on 07/03/2025

5. Mobile Market

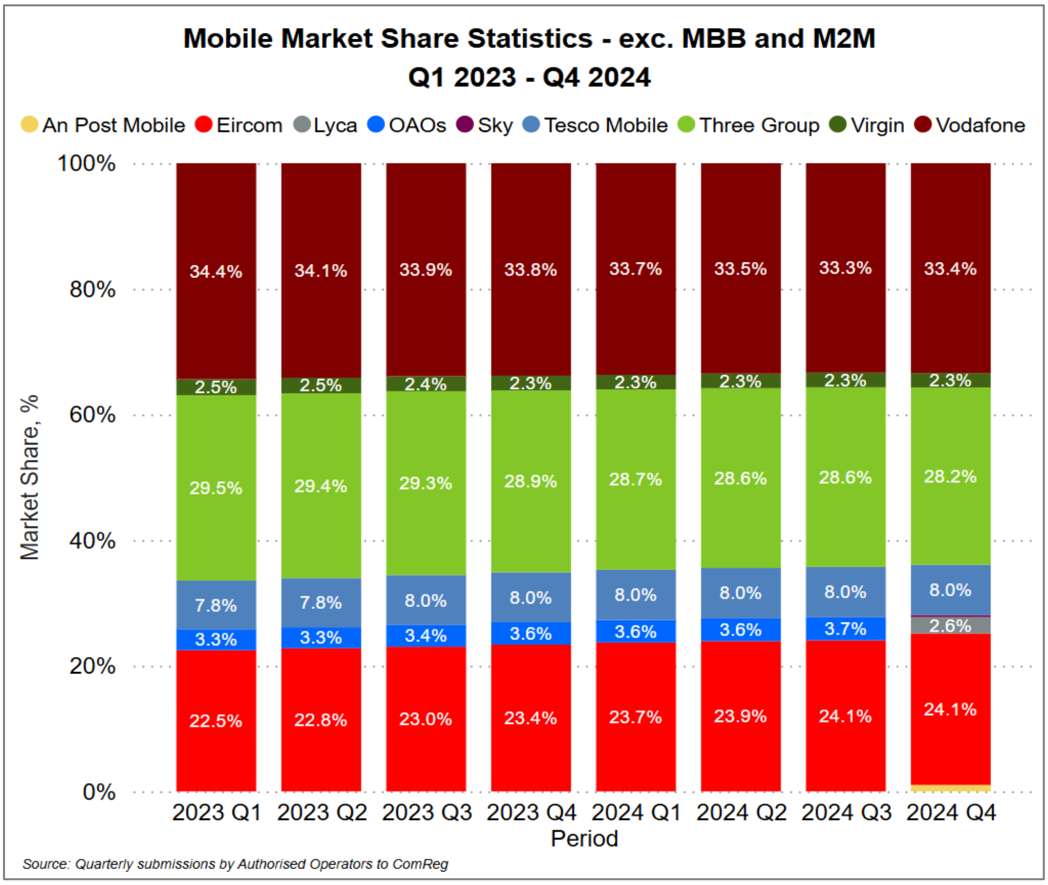
At the end of Q4 2024 there were 10,295,164 mobile subscriptions in Ireland, including mobile broadband ('MBB') and Machine to Machine ('M2M'). If mobile broadband subscriptions (391,262) and M2M subscriptions (3,984,713) are excluded, the total number of mobile voice subscriptions was 5,919,189

Figure 7 - Market Shares by Subscription including Mobile Broadband and Machine to Machine



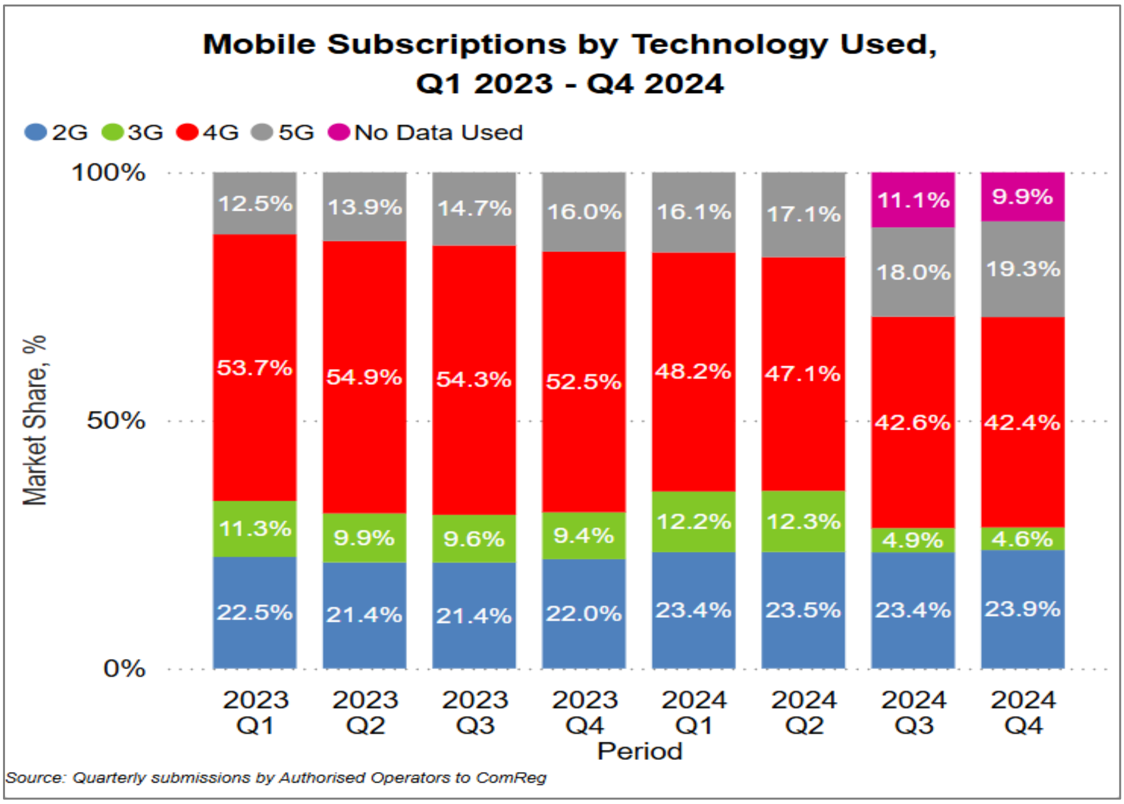
- In Q4 2024 Three had the largest share of mobile subscriptions including MBB and M2M at 48.4%. This was followed by Vodafone with 28.7%, Eir with 14.6%, Tesco Mobile at 4.6% and other operators at 3.7%.

Figure 8 - Market Shares by Subscription excluding Mobile Broadband and Machine to Machine



- In Q4 2024 Vodafone had the highest market share excluding mobile broadband and M2M (33.4%), followed by Three (28.2%), Eir (24.1%), Tesco Mobile (8.0%), Lyca (2.6%), Virgin Mobile (2.0%) and other operators (1.7%).

Figure 9 – Mobile Subscriptions by Technology



- There were 2,457,279 2G (23.87%), 468,882 3G (4.55%), 4,364,596 4G (42.39%) and 1,987,047 5G (19.3%) mobile subscriptions in Q4 2024. 1,017,360 (9.9%) mobile subscriptions did not record any use of data in Q4 2024.

6. Corrigenda and Notes to Q3 2024

Note 1: Voxbone revised Mobile Wholesale Revenue for Q3 2024.

Note 2: Nuacom revised Voice Traffic for Q3 2024.

Note 3: Lyca revised ARPU for Q3 2024.

Note 4: IFA revised DSL volumes

Note 5: BT revised Revenue Retail VOIP line rental and connections

7. Appendix 1: Legal Disclaimer

The information and statistics contained within this document are derived from a variety of sources, but it is mostly reliant on data obtained from authorised operators.

This document does not constitute commercial or other advice. No warranty, representation or undertaking of any kind, express or implied, is given in relation to the information and statistics contained within this document.

To the fullest extent permitted by law, neither the Commission for Communications Regulation ("ComReg") nor any of its employees, servants or agents will be liable for any loss or damage arising out of or in connection with your use of, or any reliance whatsoever placed on this document (including, but not limited to, indirect or consequential loss or damages, loss of income, profit or opportunity, loss of or damage to property and claims of third parties) even if ComReg has been advised of the possibility of such loss or damages or such loss or damages were reasonably foreseeable.